RESERVE OFFICER CANDIDATE INDOCTRINATION (ROCI) – Non Prior Service – Hired to IRR

Step	Action
1	**Accessions** Add New Applicant Find Applicants Applicant Lists Find Job Openings Interview Calendar Pending CAD Report Add Applicant Recruiter-In-Charge Workspace Recruiter Workspace Reservations Workspace Search Applicants View Recruiting Plan View A-School Plan Import Plan Data Load Zip codes Accession Program Accessions Forms Accessions Forms Fields Recruiting Locations Question Set Definition Question Definition Job Opening Maintenance Hire Applicant **Add a Person** From the Portal Page, select **Add a Person** from the Accessions pagelet.
2	**United States Coast Guard** U.S. Department of Homeland Security Home Add to My Links Worklist My Links Select One: My Page Guest Self Service Investor Administration Requests New Window Help Customize Page **Add a Person** Person ID: NEW **Add Person** Search for Matching Persons Click the **Add Person** button.

3

The Effective Date will default to the current date. You may edit to a previous date.

Click on the Add Name button. |
| 4 |

Enter member's complete name, when completed click the **OK** button.

Note: With respect to the middle name, do not use the traditional **NMN** for those members with no middle name: this will cause the issuance of a government travel card with a middle initial of "N" and cause a subsequent denial of its use for a member so identified. Leave blank.

You will return to the Biographical Details Tab. |

5	
	The Effective Date defaults to the current date. It may be edited to reflect the actual hire date. It cannot currently be future dated.
	• Date of Birth: Enter the member's date of birth.
	• Birth Country: Defaults to USA, if incorrect, select the lookup and select the correct Birth Country. If selecting other than USA, other fields may be displayed.
	• Birth Location: City/Town of birth.
	• Gender: Click the dropdown and select appropriate gender.
	• Highest Education Level: Click the dropdown and select education level.
	• Marital Status: Click the dropdown and select applicable status.
	• Language Code: Click the dropdown and select English.
	• National ID: Enter the member's Social Security Number.
	When completed, select the **Contact Information Tab**.
6	
	The system defaults the first address as Home and the As Of Date is the date of hire.
	Select the **Add Address Detail** link.

7	**Address History** Address Type: Home **Address History** Find First ◄ 1 of 1 ► Last *Effective Date: 07/14/2014 📅 Address: + − Country: USA 🔍 *Status: A 🔍 Add Address OK Cancel Refresh The effective date defaults to the current date and may be edited to reflect the correct date of hire. This date currently cannot be future dated. Select the **Add Address** link.	
8	**Edit Address** Country: United States Address 1: 1 Knockout Lane Address 2: Address 3: City: Boston State: MA 🔍 Massachusetts Postal: 02124 County: Suffolk OK Cancel Address 1: Number/street name Address 2: Not used Address 3: Not used City: Enter address city State: Enter Address state Postal: Enter Postal Zip code County: Enter county (if known) Click the **OK** button.	
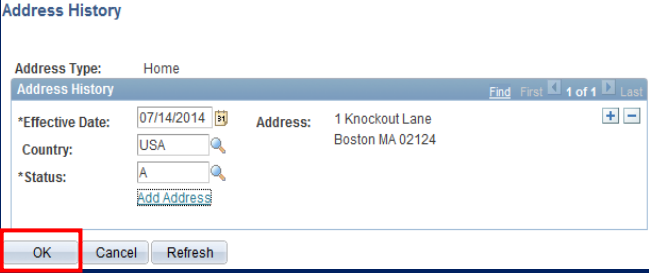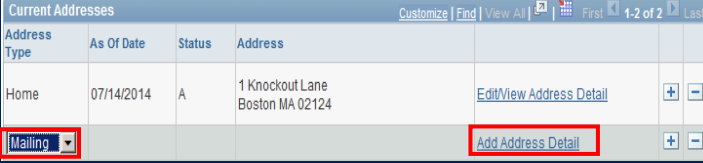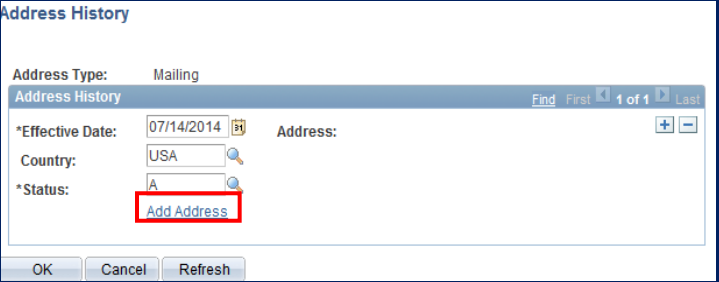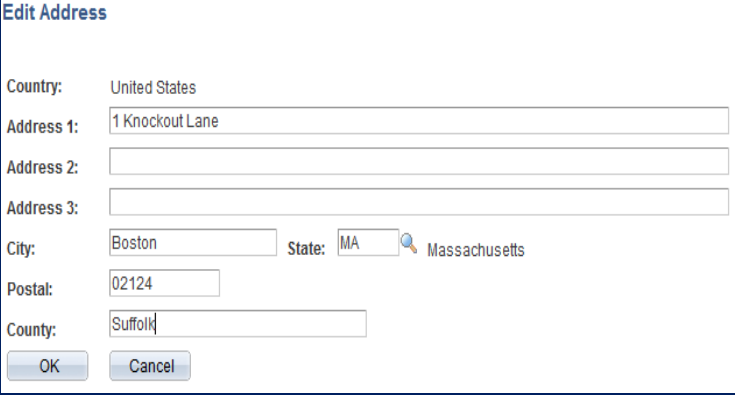
9	**Address History** Address Type: Home **Address History** Find First ◄ 1 of 1 ► Last *Effective Date: 07/14/2014 📅 Address: 1 Knockout Lane Country: USA 🔍 Boston MA 02124 *Status: A 🔍 Add Address OK Cancel Refresh The address will display as entered. Select the **OK** button.	
10	**Current Addresses** Customize	Find	View All	🔃	🔲 First ◄ 1 of 1 ► Last | Address Type	As Of Date	Status	Address		
Home	07/14/2014	A	1 Knockout Lane Boston MA 02124	Edit/View Address Detail	➕ ➖	 The Home address has been recorded. Click the "+" to add a Mailing Address.	
11	**Current Addresses** Customize	Find	View All	🔃	🔲 First ◄ 1-2 of 2 ► Last | Address Type	As Of Date	Status	Address		
Home	07/14/2014	A	1 Knockout Lane Boston MA 02124	Edit/View Address Detail	➕ ➖
Mailing ▾				Add Address Detail	➕ ➖	 Click the Address Type drop down and select **Mailing**. Then click the **Add Address Detail** link.	
12	**Address History** Address Type: Mailing **Address History** Find First ◄ 1 of 1 ► Last *Effective Date: 07/14/2014 📅 Address: Country: USA 🔍 *Status: A 🔍 Add Address OK Cancel Refresh Click the Add Address link.	
13	**Edit Address** Country: United States Address 1: 1 Knockout Lane Address 2: Address 3: City: Boston State: MA 🔍 Massachusetts Postal: 02124 County: Suffolk OK Cancel Enter Mailing Address. Address line 2 and 3 are not used. When completed, click the **OK** button.	

14	 The Mailing address will be listed as entered. Click the OK button.
15	 Click the "+" and repeat steps 10, 11 and 12 to enter a Home of Record as identified on the DD4.
16	 The Phone Information, Email Address and Instant Message IDs are left blank. Select the **Regional** Tab.
17	 Click the Ethnic Group lookup and select the appropriate category. If member claims other than one ethnic group, click the "+" button and add Hispanic or Non-Hispanic or for any additional group designation. All other data fields are left blank. Select the **Organizational Relationship** Tab.

18	
	Check the **Employee** box and then click the Add Relationship button.

The Employee ID number will be generated and you will automatically navigate to Job Data. |
| 19 | |
| | You should record the Employee ID number for future reference. If for any reason you do not complete this accession during this session, you may use the **Add Employee Instance** link in the **HR Data Shortcuts** pagelet. Enter the Employee ID number and you will be returned to member's Job Data. All previous Job Data entries will have been deleted and will need to be reentered.

Do not use the Add Employee Instance if you had previously entered and saved Job Data. Any edits after initial save should be made using Modify a Person or Job Data links.

The effective date defaults to the current date. This date may be future dated to reflect actual hire date.

Enter the appropriate Position Number. For hire as SAOC into the IRR enter 00095687. You may click on the lookup button to search for other position numbers. For example a member being hired under ROCI but prior service as an officer with no break in service, use position identified on the PCS orders.

Position Entry Date: Date of Hire.

Click the **Override Position Data** button. |

19 cont.	The Regulatory Region, Company, Business Unit, Department, Department Entry Date and Location should default as shown. If they do not, click the lookup button and set them to:
	• Regulatory Region: RSV
	• Company: ACG
	• Business Unit: ENLCG
	• Department: 002817
	• Department Entry Date: Date of Hire
	• Location: Default with data matching Department entered.

Reserve Class Code: Click on the lookup icon and select N.

Click on the **Job Information Tab**.

20

Job Code: Enter 451097 if not defaulted (ROCI hire to IRR as SAOC) and Tab.

Supervisor ID: Enter the Employee ID for the CGHRSUP that will be approving the accession.

Employee Class: Click on the drop-down and select **IRR**.

Click on the **Job Labor Tab**. |
| 21 |

Labor Agreement: Click on the lookup icon: select **ENL**.
Select appropriate **Employee Category** from drop-down
Select the **Employee Subcategory** (TRAYPAY Code) |

The **Labor Agreement Entry Dt** will default to date of hire.
Click on the **Job Labor** tab

22	

Scroll down the page to **Assigned Seniority Dates** and select **View All**.

23	

Assigned Seniority Dates — Customize | Find | View 5 | 🔳 | 🌐 First 1-23 of 23

Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason
ACTIVE DUTY BASE DATE		07/14/2014	☐	
AD PAY SCALE DATE		07/14/2014	☐	
DEP DATE			☐	
CMA DATE		07/14/2014	☐	
DIEMS DATE		07/14/2014	☐	
RSV DRILL OBLIGATION DATE		07/13/2022	☐	
EXPECTED LOSS DATE		07/13/2022	☐	
JOB FAMILY ENTRY DATE		07/14/2014	☐	
MIL OBLIGATION COMPL DATE		07/13/2022	☐	
PAY ALLOWANCE DATE		07/14/2014	☐	
POINTS SWE DATE			☐	
PAY BASE DATE		07/14/2014	☐	
DATE OF RANK	451097	07/14/2014	☐	
RSV COMP SBP ELECT DATE			☐	
ROTATION DATE			☐	
RSRV ACCESSION CLASS DATE		07/14/2014	☐	
RSV ANNIVERSARY DATE		07/14/2014	☐	
RSV ELIGIBILITY DATE			☐	
RSV INITIATION DATE		07/14/2014	☐	
RESERVE LETTER DATE			☐	
RTB ELIGIBILITY DATE			☐	
RTB LETTER DATE			☐	
RTB LETTER RESPONSE DATE			☐	

Only enter dates as indicated. All other fields are blank.
- Active duty Base Date: Leave Blank
- AD Pay Scale Date: Date of Enlistment Contract
- CMA Date (Per Situation IAW Ch 3 PAYMAN)
- DIEMS Date: Date Initial Entry Military Service (any component)
- RSV Drill Obligation: 6 years in a drilling status (SELRES)
- Expected Loss Date: 8 years from DIEMS date (minus 1 day)
- Job Family Entry Date: Date of Enlistment Contract
- Mil Obligation Completion date: 8 years from original DIEMS date (minus 1 day) unless prior discharge authorized under an approved program (i.e. VOLSEP)
- Pay Allowance Date: Date of Enlistment Contract
- Pay Base Date: Date member departs on RSV IADT orders to OCS.
- Date of Rank: Date of Enlistment Contract
- RSRV Accession Class Date: Date of Enlistment Contract
- RSV Anniversary Date: Date of Enlistment Contract
- RSV Initiation Date: Date of Enlistment Contract

Click the Payroll tab

24	
	Click the Pay Group lookup icon and select **USCG STG** (if not defaulted).
	Click on **Salary Plan**
25	
	Salary Admin Plan: Should default to **ENL**.
	Grade: Defaults to Pay Grade based on Job Code entered on the Job Information Tab. If member is being accessed at a different grade, click the lookup icon and select the appropriate Grade. In this example E2 based on SAOC Job Code.
	Step: Enter 1 and Tab.
	Step Entry Date: Will default to date of Hire.
	If Prior Military Service: Click on the Step lookup icon and select the appropriate step. The step corresponds to a member's longivity for pay purposes. In this example 1 = less than 2 years military service, then Tab.
	Click on the **Compensation** Tab.

26	
	Click on the **Default Pay Components** button. This will update the **Compensation Rate** data.

Click the **Employment Data** link. |
| 27 | |
| | This is largely a view-only page (no data to enter)
Click on the **Benefits Program Participation** link |

28	Benefit Program: Click the lookup icon and select **ACG** (if not defaulted) Effective Date: If you are completing the Job Data AFTER the effective date of hire, you need to change the date to the date of hire. Benefits System should read **Base Benefits** Click the **Job Data** link.
29	Click the **OK** button.
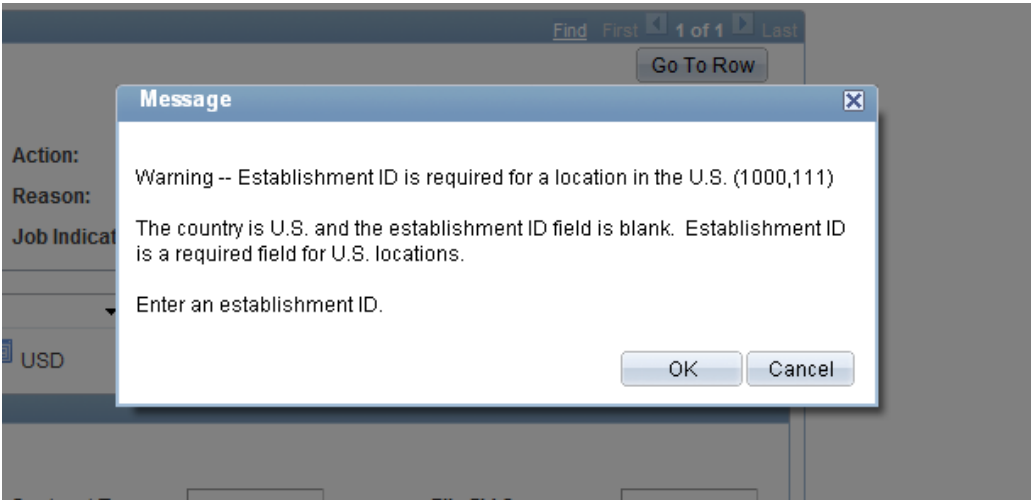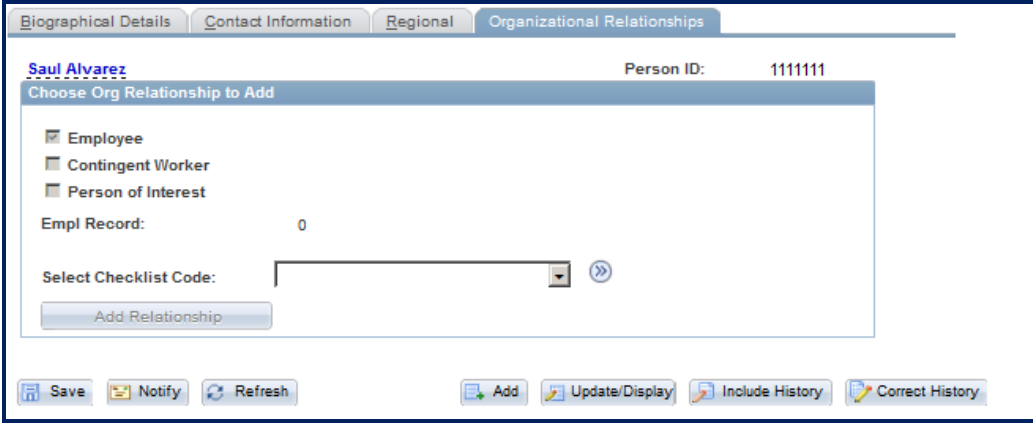
| 30 | You will receive several "Warning" messages:

Head Count – Click the OK button.

RESERVE UNBUDGETED POSITION

Message

Warning -- Head count of 1125 exceeds maximum head count of 0 for position. (1000,156)

When Position Management is installed, head counts for each position are compared to the maximum head count on the Specific Information page. Correct position number, change maximum to allow an additional incumbent, or leave as is.

OK   Cancel

Date Created: 06/14/2013

Hourly Rate – Click the OK button.

RESERVE UNBUDGETED POSITION

Message

Warning -- Hourly Rate is less than the minimum specified in the Salary Grade Table. (1000,32)

A minimum hourly rate is specified in the Salary Grade Table, and the hourly rate entered on this panel falls below that minimum.

If the specified hourly rate is correct, leave as is. Otherwise, enter the correct hourly rate.

OK   Cancel |

30 cont.	Establishment ID Click the OK button.
31	After a successful Save you will be returned to the Organizational Relationships Tab.

Accession Approval
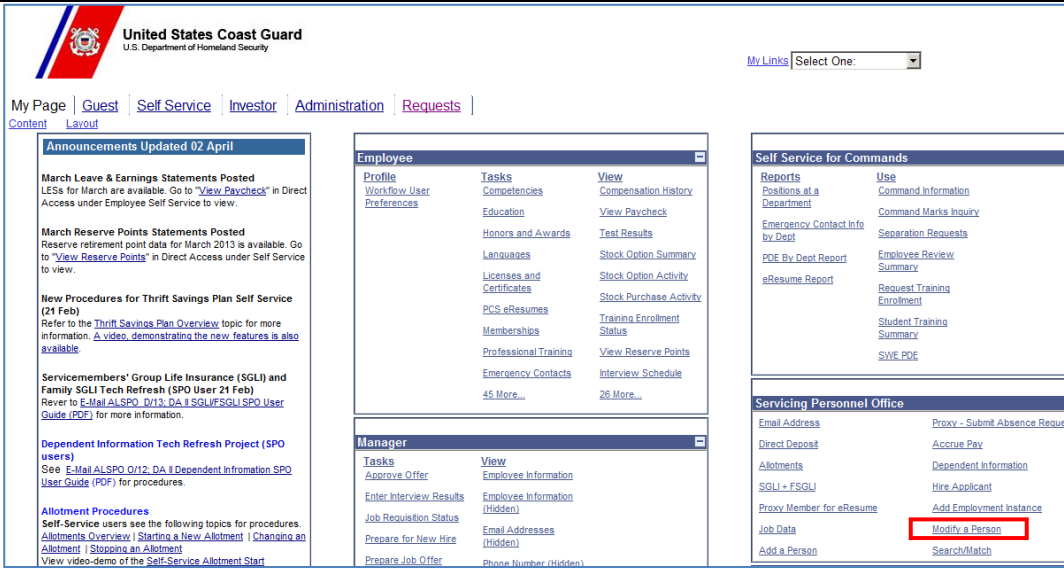
Introduction	This section provides the procedure for approving an accession.

Discussion	SPO Auditor/PAO user access is required to approve an accession. The approver cannot be the same person who entered the accession.
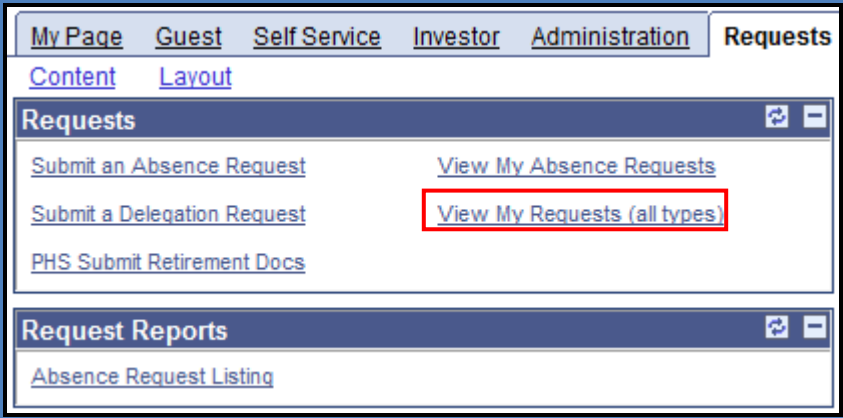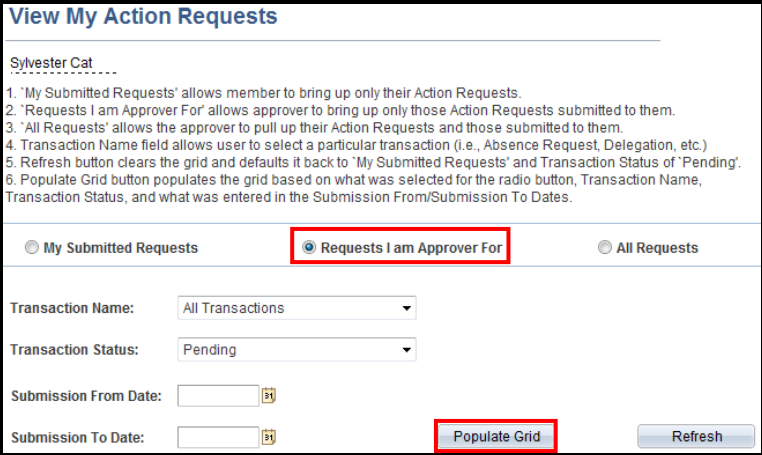
Procedure

Step	Action
1
As approver you should review/audit the accession process prior to approval.

From the Portal Page you click the **Modify a Person** and **Job Data** links for review/audit. Once you have completed review, follow the procedures below for approval.

From the Portal Page, select **Requests** located at the top of the page. |

Accession Approval, Continued

Discussion **(continued)**

Step	Action
2	Click the **View My Requests (all types)** link.
3	Select the Requests I am Approval For radio button. The Transaction Name and Transaction Status defaults for all pending transactions. You may click the drop down to narrow your search parameters. Click the Populate Grid button.

Accession Approval, Continued

Discussion **(continued)**

Step	Action
4	**View My Action Requests**

Sylvester Cat

1. 'My Submitted Requests' allows member to bring up only their Action Requests.
2. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them.
3. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them.
4. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.)
5. Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'.
6. Populate Grid button populates the grid based on what was selected for the radio button, Transaction Name, Transaction Status, and what was entered in the Submission From/Submission To Dates.

○ My Submitted Requests   ● Requests I am Approver For   ○ All Requests

Transaction Name: All Transactions

Transaction Status: Pending

Submission From Date: [   ]

Submission To Date: [   ]   [Populate Grid]   [Refresh]

Customize | Find | View All | | | First 1-5 of 5 Last

Transaction Name	Status	Member	Member's Emplid	Submitted By	Approver	Submission Date	Approve/Deny
AccessionHire	Pending	Eusebio Pedroza	1234567	Mickey Mouse	Sylvester Cat	06/18/2013	Approve/Deny
AccessionHire	Pending	Brad Majors	1112223	Goofy Dog	Sylvester Cat	05/24/2013	Approve/Deny
AccessionHire	Pending	Janet Weiss	2223334	Daffy Duck	Sylvester Cat	05/23/2013	Approve/Deny

A listing of all accessions you have been identified for approval will be displayed.

Select **Approve/Deny** for the member you are approving.

Accession Approval, Continued

Discussion **(continued)**

Step	Action
5	**Action Request** **Approval/SOD for Accessions** Darth Vader • Review hire data in the Request Information box. • To approve a Hire Request, press the Approve button. • To deny a Hire Request, enter a comment and press the Deny button. A Notification will be sent to the originator. • After a Hire Request has been approved, data will be pushed to DA 8.0. **Request Details** Employee ID: 1234567 **Request Approvers** Approver: 7654321 Sylvester Cat Comment: Approve Deny **Accessions Hire Approval** ▽ **Delegation Approval Process: Pending** ⊜View/Hide Comments One Approval level **Pending** 🕐 Sylvester Cat Initial Approve Action Request ▽ **Comment History** Mickey Mouse at 05/18/2013 - 2:55 PM View History You can now either Approve or Deny the accession. You may enter any comments for the review by the person who submitted the accession for approval. Select either **Approve** or **Deny.**

Accession Approval, Continued

Discussion **(continued)**

Step	Action
6	**Action Request**
	Approval/SOD for Accessions
	Darth Vader
	• Review hire data in the Request Information box.
	• To approve a Hire Request, press the Approve button.
	• To deny a Hire Request, enter a comment and press the Deny button. A Notification will be sent to the originator.
	• After a Hire Request has been approved, data will be pushed to DA 8.0.
	Request Details
	Employee ID: 1234567
	Request Approvers
	Approver: 7654321 Sylvester Cat
	Comment:
	[Approve] [Deny]
	Accessions Hire Approval
	▽ **Delegation Approval Process:Approved**
	One Approval level
	Approved
	✔ Sylvester Cat
	Initial Approve Action Request
	06/24/13 - 12:39 PM
	▽ **Comment History**
	Mickey Mouse at 05/18/2013 - 2:55 PM
	View History
	If Approved, the Approve/Deny buttons will gray out after system saves the approval.
	You can now click on the "X" at the top of the document to close this page and repeat the process for the next accession.

Accessions – Contract Data

Introduction   This section provides the procedure for completing the contract of a Reserve Officer Candidate Indoctrination (ROCI)
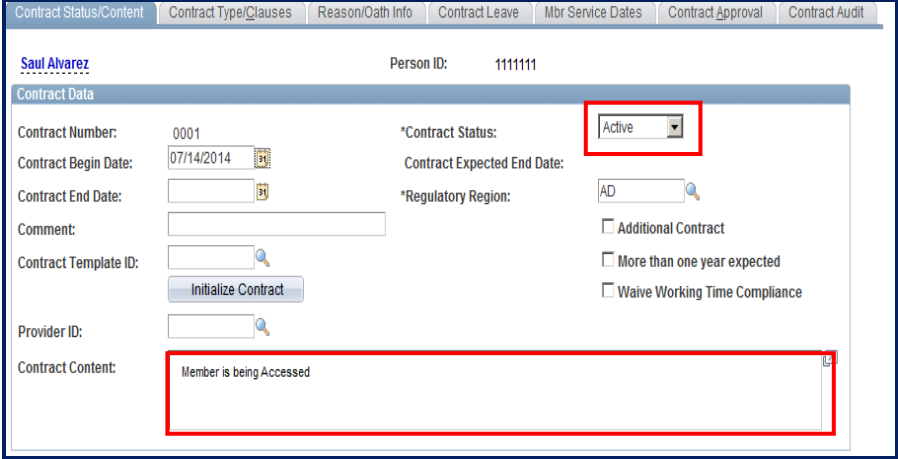
Procedure   Follow these steps to complete the contract of a ROCI

Step	Action
1	 From the portal Page, navigate to Contract Data found on the Career Management pagelet
2	 Click on **Add a New Value**
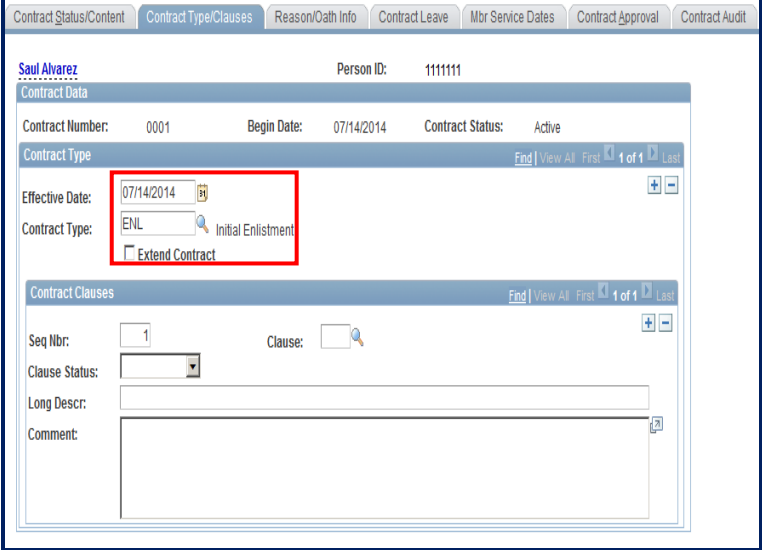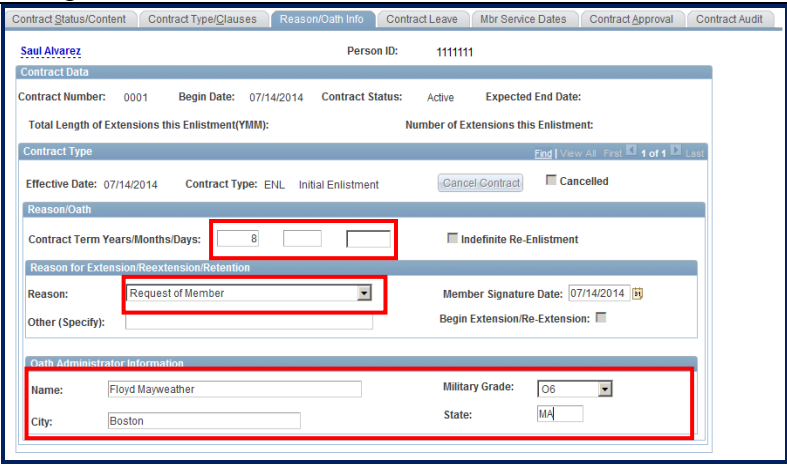
Accessions – Contract Data, Continued

Step	Action
3	 Enter **EMPLID** and **Contract Number** (First contract = 0001) Click **Add** You will be navigated to Contract Status/Content
4	 Contract Status/Content page will appear with Contract Number (in this case 001) Ensure Contract Begin Date is appropriate date Alter Regulatory Region to appropriate region (in this case AD) **A Contract Content statement is required** Navigate to **Contract Type/Clauses**

Accessions – Contract Data, Continued

Step	Action
5	 Enter appropriate Contact Type from the drop-down Effective date should default correctly Under Contract Clauses you may select **Clause status (optional/required)** and Enter any contractual specific comments Navigate to **Reason/Oath Info**
6	 Enter Contract Term Years/Months/Days (in this case 8 years) Select a **Reason** from the drop-down and Select **Member Signature Date** (date contract signed) Add **Name of Oath Administrator** and applicable **Military Grade** and **City/State** where contract was administered. Navigate to **Contract Leave tab**

Accessions – Contract Data, Continued

Step	Action
7	 Enter any leave to be sold Navigate to Mbr Service Dates
8	 Click **View All** on **Assigned Seniority Dates** Note: these dates should concur with dates set during the ACCESSION process; if not, return to Job Data and <u>verify the dates entered during the ACCESSION process</u> are entered correctly. Navigate to **Contract Approval**

Accessions – Contract Data, Continued

9	

Click on **Submit for Approval** and approval will be routed to **Approving SPO**
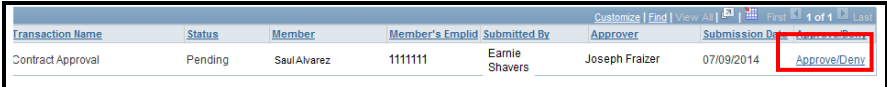
Contract Approval

Introduction   This section provides the procedure for approving a contract.

Discussion   SPO Auditor/PAO user access is required to approve a contract. The approver cannot be the same person who entered the accession.

Procedure   Follow these steps to approve a contract

Step	Action
1	 Approver should select Requests
2	 Select View My Requests (all types)
3	 Select **Requests I am Approver For** and **Populate Grid**
4	 Click on **Approve/Deny**

Contract Approval, Continued

Step	Action
5	Enter comments and click Approve or Deny Note: selecting Deny returns contract to HRS user
6	Contract is approved. Member is fully Accessed into USCG